

DDI's Steps to Successful Portfolio Management:

1. Good MIS

We ensure that clients have good management information systems so that they can generate good reports. A good MIS helps to ensure that the reports generated can be relied upon.

2. Always look out for “red flags”

We always look out for ‘red flags’- indicators that a problem is likely to occur and then we take steps to nip them in the bud. This has helped to forestall having to deal with bigger or unexpected problems.

3. Train and re-train!

We find in most cases that we need to train and re-train the clients in order to ensure that we have quality output. Apart from the formal workshop trainings, we take advantage of monitoring visits to provide on-the-job training tailored to the needs of specific clients. The need to re-train clients could arise from any or a combination of the following:

- a. Staff turnover
- b. Inadequate competencies
- c. Skill gaps identified during the review of clients' reports.

4. Lessons Learned Workshop

We hold semi-annual lessons learned workshops with all the ADF-funded clients. These are usually interactive and participatory sessions where the clients share their experiences and learn problem-solving skills from one another. The clients also benefit from learning from their peers what has worked for them and how they have managed to sustain progress. These sessions also give insights to problems affecting them and what may be done to resolve to them.

5. Periodic In-house Portfolio Reviews

We carry out in-house assessments of projects in our portfolio and collectively decide on best strategies to sustain performing projects and provide remedial solutions to projects that are not performing.

6. Feedback System

We have an efficient feedback system that ensures that we provide feedback to the clients after each monitoring visit and after the review of their quarterly reports. We provide detailed information on specific issues identified and how to resolve the issues - with a follow-up action plan delineating who is responsible for what action and the projected time-line for completion. We also commend the grantees generously whenever a project is performing.

7. Level of Monitoring

The intensity of monitoring and the level of attention we give to a grantee would depend on the current performance of the project and the magnitude of the problems anticipated.

We also proffer helpful solutions to problems identified and encourage the clients to follow-up on them. In general, the intensity of monitoring increases in the following order: Performing Projects ➡ Projects on the “Watch List” ➡ “At Risk” Projects.

8. Self-Monitoring or Assessment

We encourage the clients to continuously monitor their performance so that they can see how close they are to or how far they are from meeting their project targets. To ensure that this is done, we require that they conspicuously display an enlarged and framed copy of their project log frame in the office premises. This serves as a constant reminder of the project targets they have to meet.

9. Transparency

We encourage the groups to be very transparent in their dealings with us. We help them appreciate that we also have a stake in the project and that we are interested in the success of their projects as much as they are. This way, they feel more relaxed and view us as partners working towards a common objective rather than ‘inspectors’.

10. “God fathers”

We have allocated all the projects in our portfolio to the different members of staff who have the primary responsibility of managing each project. This member of the staff would normally be the most knowledgeable about the projects assigned to him and would take the lead in the review of the reports from the projects. However, we have found it useful to conduct joint report reviews of all reports as other staff may bring different insights into the project review process for a well-rounded out perspective.

11. Recommendations of Grant Suspension /Termination

Much as we try to manage the projects, we are alert to recommend suspension or termination of the project where we cannot justify the additional use of resources to monitor and remedy the project. Our watchword therefore, is, ‘Manage the problems in the best way possible but recommend suspension/termination when all remedial measures have been exhausted’.